



In-Person Assistance Program

September 6, 2013



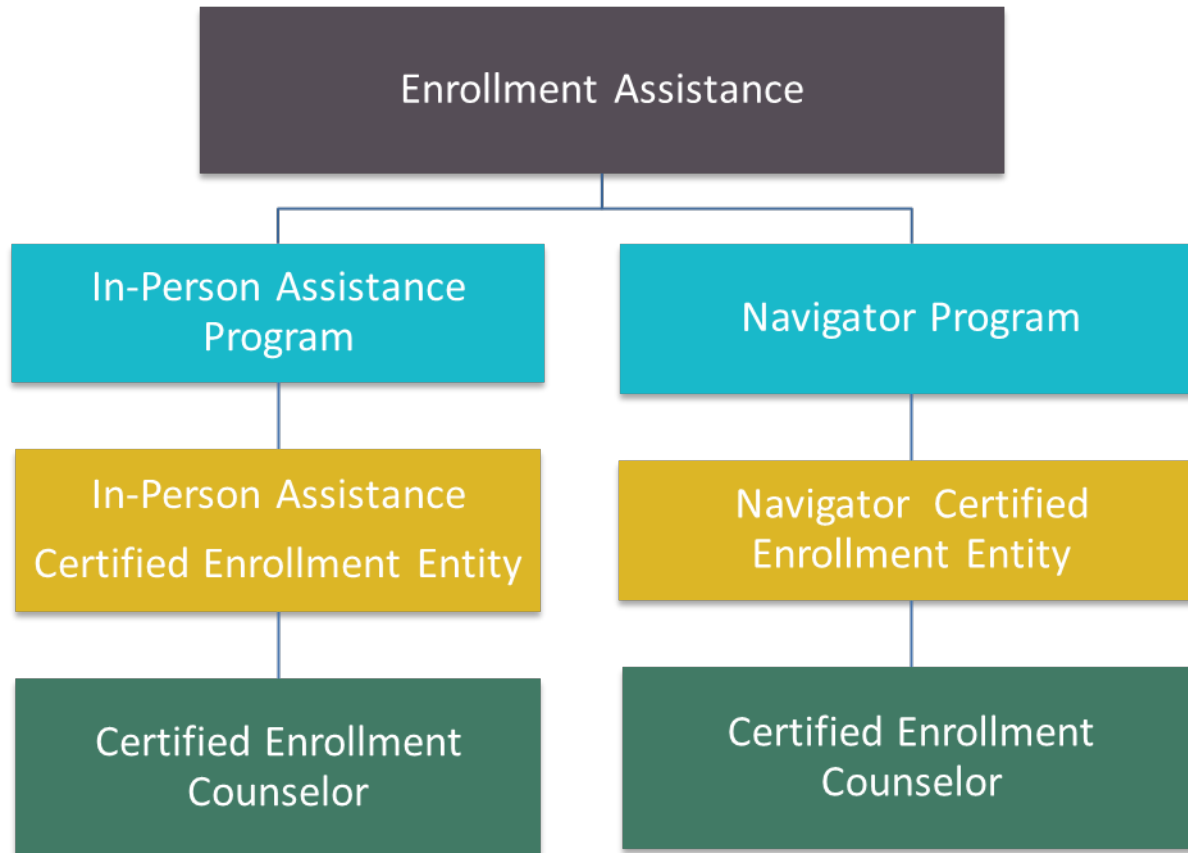


Topics Covered in this Presentation

- In-Person Assistance (IPA) Program
- Certified Enrollment Entity and Certified Enrollment Counselor Roles
- IPA Program Eligibility
- IPA Program Compensation
- Becoming a Certified Enrollment Entity
- Becoming a Certified Enrollment Counselor
- Fingerprinting and Criminal Background Check
- Overview of Training



Enrollment Assistance Program



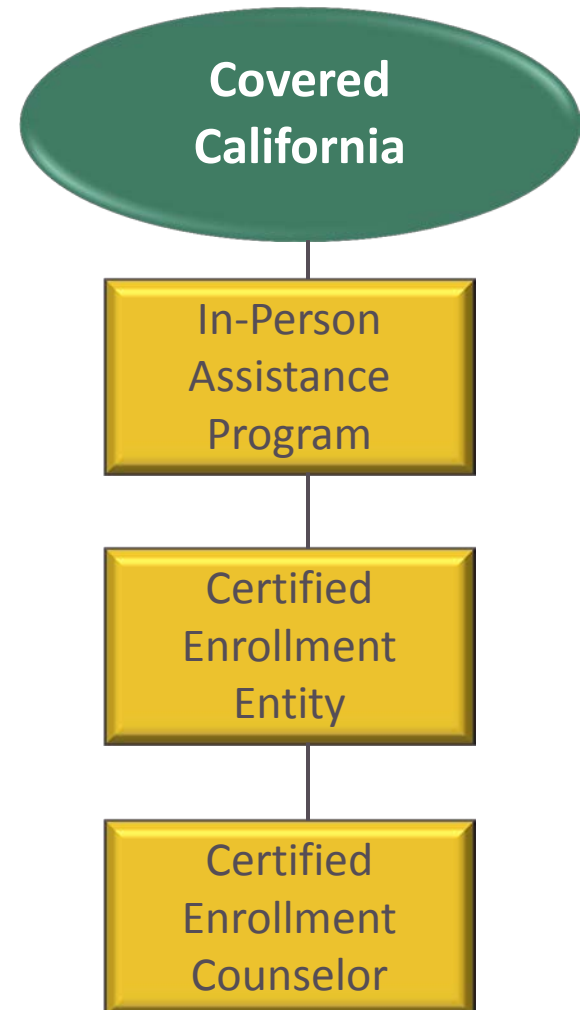
IPA Program Overview

Purpose

The Covered California In-Person Assistance Program works with Certified Enrollment Counselors (CECs).

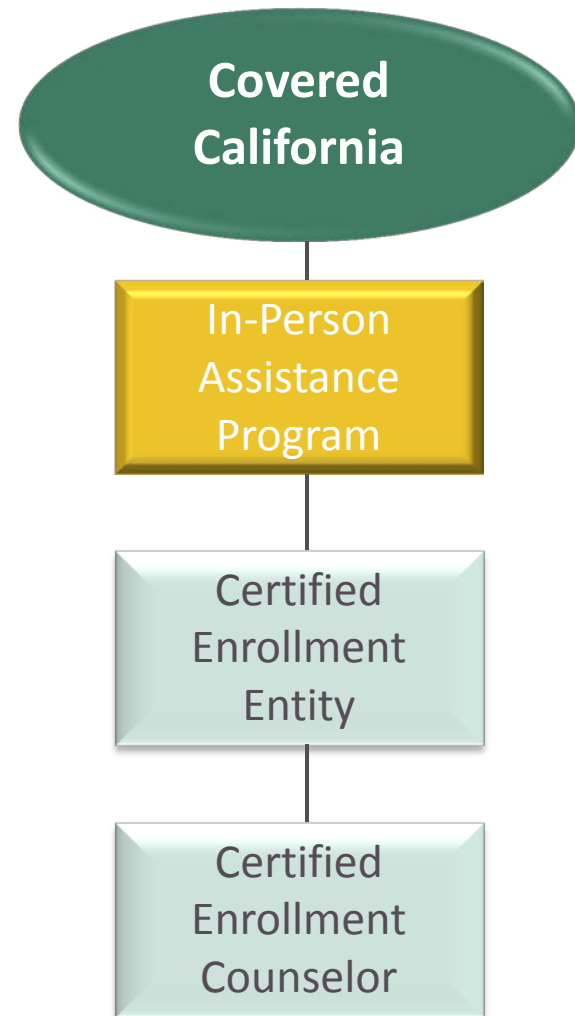
Certified Enrollment Counselors (CECs) affiliate with Certified Enrollment Entities to provide one-on-one, in-person assistance.

CECs will assist consumers with enrolling in a Covered California Health Plan and renew coverage each year.



In-Person Assistance (IPA) Program:

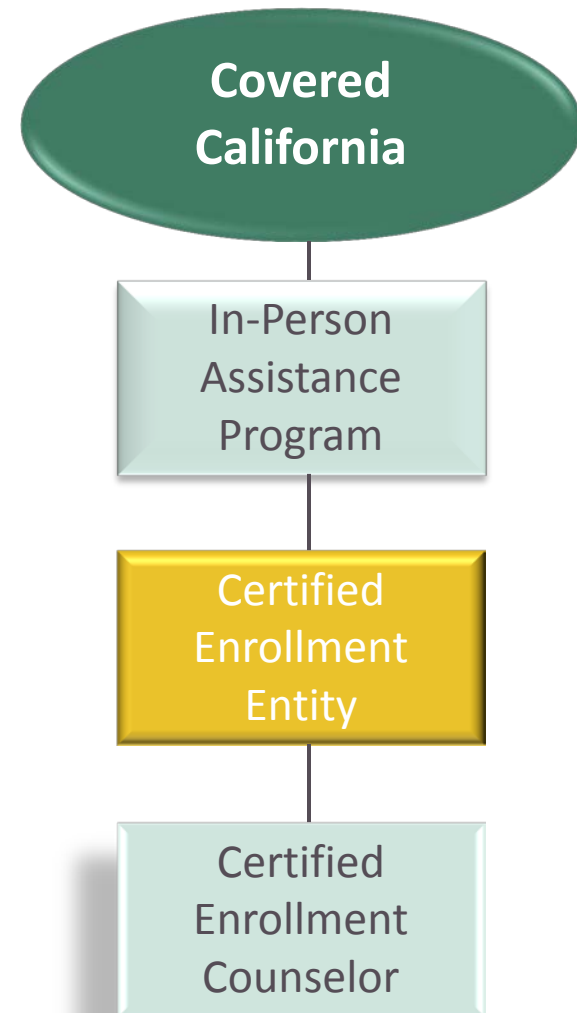
The program whereby Certified Enrollment Entities may be compensated per successful application that results in the effectuation of coverage into a Covered California Health Plan.



IPA Program Overview

Certified Enrollment Entity (CEE):

An entity or individual registered by Covered California to provide one-on-one consumer assistance. A Certified Enrollment Entity will be registered in the In-Person Assistance Program.

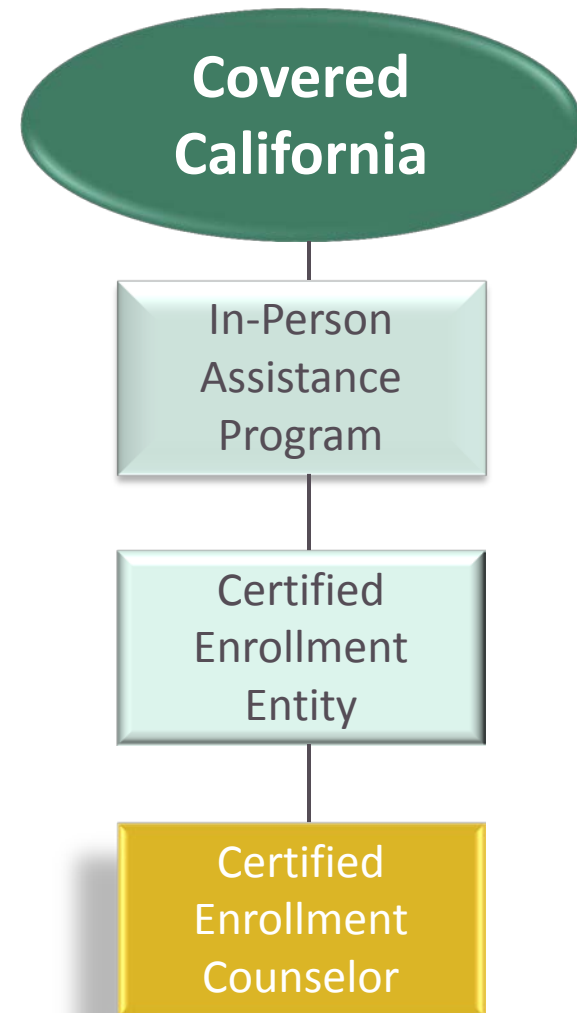




IPA Program Overview

Certified Enrollment Entity (CEE):

An entity or individual registered by Covered California to provide one-on-one consumer assistance. A Certified Enrollment Entity will be registered in the In-Person Assistance Program.



CEE and CEC Roles





CEEs and CECs Responsibilities

- **Certified Enrollment Entities (CEEs)**



- **Certified Enrollment Counselors (CECs)** conduct the following activities on behalf of Covered California:





Certified Enrollment Entities

Certified Enrollment Entities are responsible for recruitment and retention of Certified Enrollment Counselors that will reflect the cultural and linguistic make up of the target markets.

Efforts by CEEs include:

- Ensuring that all individuals affiliated with the CEE, who plan to become Certified Enrollment Counselors submit to the fingerprinting-based criminal background check, as required by the Agreement
- Ensuring that all Certified Enrollment Counselors are trained and certified by Covered California
- Distributing information and communications provided by Covered California in a timely fashion
- Updating Covered California on any status changes of Certified Enrollment Counselors affiliated with the organization



Certified Enrollment Counselors

Under the guidance of the Certified Enrollment Entities, Certified Enrollment Counselors are expected to:

- Provide information about available Covered California Health Plans and financial help in the form of premium assistance and cost-sharing reductions
- Explain the enrollment options; with a Certified Enrollment Counselor, via CalHEERS or through the Covered California Service Center
- Educate consumers about the value of health insurance and answer their questions
- Inform consumers about premium costs and the benefits of enrolling in Covered California Health Plans
- Provide consumers with support and access to tools and resources that assist in comparing costs, benefits and coverage options



Objective of Certified Enrollment Entities

CEE OBJECTIVES

ENSURE	CEC's are knowledgeable about Covered California Health Plans
EQUIP	CEC's with information and expertise needed to successfully: <ul style="list-style-type: none">• Persuade consumers of the value of health insurance• Assist consumers in applying for coverage leading to enrollment
PROMOTE	Retention of existing insurance coverage and public programs, individual market, and employer-based coverage

Eligibility





CEE Eligible Entities

American Indian Tribes or Tribal Organizations	Licensed health care clinics*
Chambers of Commerce	Licensed health care institutions*
City Government Agencies	Licensed health care providers*
Commercial fishing industry organizations	Non-Profit Community Organizations
Community Colleges or Universities	Ranching and farming organizations
County departments of public health, city health departments, or county departments that deliver health services*	Resource partners of the Small Business Administration
Faith-Based Organizations	School Districts
Indian Health Services and Facilities	Tax preparers as defined in Section 2225 (a) (1) (A) of the Business and Professions Code
Labor Unions	Trade, industry, and professional organizations
Licensed attorneys (i.e. family law attorneys who have clients that are experiencing life transitions)	Other public or private entities or individuals who meet the requirements of this Article except for entities and individuals who are licensed by the Department of Insurance)



Entities NOT Eligible for Compensation

The following Entities will NOT be compensated by Covered California:

County departments of public health or city health departments that deliver health care services

Licensed health care clinics* (with an exception of certain types of clinics)

Licensed health care institutions

Licensed health care providers

Other public or private entities or individuals determined by Covered California to have a conflict of interest or who receive direct or indirect consideration for consumer assistance

Compensation





Compensation Scenarios Qualified Health Plans

#	Scenario	Description	Payment
1	New Enrollment with Covered California (not formerly MAGI Medi-Cal)	<ul style="list-style-type: none">Individual is not registered with Covered California and not formerly MAGI Medi-CalCEC enrolls Individual in Covered California QHP (with or without family/dependents)	\$58
2	Renewal with Covered California	<ul style="list-style-type: none">Existing Individual enrolled in Covered California with QHP coverage for 2014 (enrolled either during 1/1/13 – 12/31/13 open enrollment or Special Enrollment) renews coverage at Annual RenewalIndividual renews with Covered California and add dependents during Annual Renewal	\$25



Compensation Scenarios Qualified Health Plans

#	Scenario	Description	Payment
3	MAGI Medi-Cal redetermination results in New Enrollment with Covered California	<ul style="list-style-type: none">Individual going through MAGI Medi-Cal redetermination process is no longer eligible for MAGI Medi-CalCEC enrolls individual in Covered California QHP (with or without family/dependents)	\$58
4	New Enrollment during Special Enrollment	<ul style="list-style-type: none">Individual currently enrolled in QHP and adds family/dependents (birth, marriage, adoption, loss of essential coverage) during Special Enrollment	\$58
5	Re-enrollment into Covered California	<ul style="list-style-type: none">Individual is disenrolled from Covered California and later re-enrolls back into the Program	\$58



Compensation Scenarios Medi-Cal

#	Scenario	Description	Payment
1	New Enrollment with MAGI and non-MAGI Medi-Cal	<ul style="list-style-type: none">Individual is not registered with Covered California and not formerly Medi-CalCEC enrolls individual in Medic-Cal programs	\$58
2	Formerly Covered California, New Enrollment with MAGI and non-MAGI Medi-Cal	<ul style="list-style-type: none">Individual going through Covered California redetermination process is no longer eligible for Covered CaliforniaCEC enrolls individual in Medic-Cal programs	\$25
3	Renewal with Medi-Cal Programs	<ul style="list-style-type: none">Existing individual enrolled in Medi-Cal programsIndividual renews with Medi-Cal during Medi-Cal redetermination	\$25
4	Renewal with Medi-Cal Programs	<ul style="list-style-type: none">Individual currently enrolled in Medi-Cal and adds family/dependents (birth, marriage, adoption, loss of essential coverage)	\$25



Compensation Scenarios Medi-Cal

#	Scenario	Description	Payment
5	Re-enrollment into Medi-Cal programs during 90 day cure period	<ul style="list-style-type: none"> Applicant is disenrolled for more than 90-days and requires new application 	\$25
6	Re-enrollment into Medi-Cal Program after 90 days	<ul style="list-style-type: none"> Applicant is disenrolled for more than 90-days and requires new application 	\$58
7	Enrollment into MAGI Medi-Cal and non-MAGI Medi-Cal	<ul style="list-style-type: none"> Individual is eligible for both Medi-Cal programs One payment Amount depends on whether new enrollment or redetermination (see scenarios 1 – 4) 	\$58 or \$25
8	Enrollment into non-MAGI Medi-Cal only	<ul style="list-style-type: none"> Individual is not eligible for MAGI Medi-Cal Individual is enrolled in non-MAGI Medi-Cal 	\$58

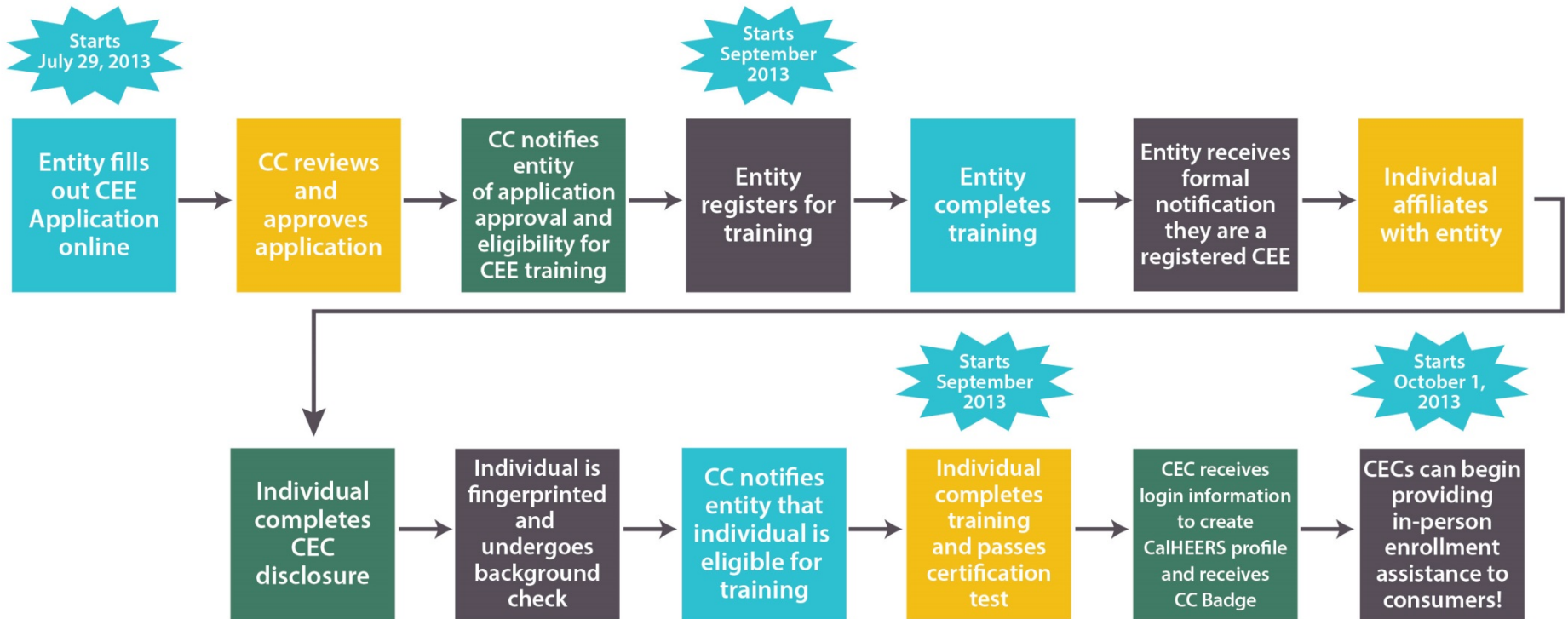
Becoming a Certified Enrollment Entity





Online Application Process

Covered California Certified Enrollment Entity Application Process



CC = Covered California CEC = Certified Enrollment Counselor CEE = Certified Enrollment Entity

Notes:

1. Dates subject to change
2. Flow chart does not outline process for the CEE Applications that are incomplete, ineligible, or individuals that fail background check.

V. 3.1



4 Steps to Becoming a Certified Enrollment Entity

1. COMPLETE THE CERTIFIED ENROLLMENT ENTITY (CEE) APPLICATION ONLINE

- Access CEE Application online
- Download and review CEE Application Checklist
- Gather necessary information and documentation
- Login or create username and password
- Complete ALL required application fields
- Download and complete Certified Enrollment Entity Agreement



4 Steps to Becoming a Certified Enrollment Entity

1. COMPLETE THE CERTIFIED ENROLLMENT ENTITY (CEE) APPLICATION ONLINE (CONT.)

- Add Covered California as an additional insured to general liability and automobile policies
- Upload Required Documents:
 - Certified Enrollment Entity Agreement
 - Proof of business status documentation
 - Proof of Insurance - general liability, automobile insurance and workers compensation
 - State of California payee data record
 - Proof of current or valid business license
- Submit CEE Application!



Online Application Process

- CEE Application Landing Page

<https://ipas.ccgrantsandassistors.org/>



COVERED
CALIFORNIA

Certified Enrollment Entity Application



Agents Start Here »

Entities Start Here »



[Click here](#) to download the Application Checklist

i Notice for Applicants

The following are important document downloads that the CEE or the CEC applicant will need to complete and upload for CEE application submission.

- CEE Agreement
- CEC Agreement
- Payee record (CEE)
- Criminal Disclosure form (for CECs)

A Notice for Agents

This application is for Certified Enrollment Entities only. On August 19th, Agents will have a profile to complete which will also allow them to register for training. For updated information please refer to: <http://www.healthexchange.ca.gov/Pages/agents.aspx>.

Need Help? Call Covered California, Enrollment Assistance Help Desk at (888) 402-0737, Monday through Friday, 8 am to 5 pm or email assisterinfo@ccgrantsandassistors.org

- Entity Information Screen

STEPS

Introduction	>
Entity Information	>
Population(s) Served	>
Location and Hours	>
Entity Contacts	>
Certified Enrollment Counselor	>
Financial Information	>
Required Documentation	>
Qualifying Questions	>
Status	>

Step 1: Entity Information

Required fields are marked with *

Entity Name * ⓘ

Business Legal Name * ⓘ

Primary Email Address * ⓘ

Primary Phone Number * ⓘ

Secondary Phone Number ⓘ

Fax Number ⓘ

Website Address ⓘ

Preferred Method of Communication *
☒ Email ⓘ
☐ Phone ⓘ
☐ Fax ⓘ
☐ Mail ⓘ



Online Application Process - Checklist

- CEE Application Checklist provides overview of fields required for the application and the documentation you will need

Certified Enrollment Entity Application Checklist

This checklist provides you with an overview of the information you will need to complete the fields within the application.

Step 1: Entity Information

- | | |
|---|--|
| <input type="checkbox"/> Entity name | <input type="checkbox"/> Business Category |
| <input type="checkbox"/> Business legal name | <input type="checkbox"/> Organization Type (see page 3) |
| <input type="checkbox"/> Primary email address | <input type="checkbox"/> Year entity was established |
| <input type="checkbox"/> Primary & secondary phone number | <input type="checkbox"/> Counties served |
| <input type="checkbox"/> Fax number | <input type="checkbox"/> Projected number of Certified Enrollment Counselors |
| <input type="checkbox"/> Website address | <input type="checkbox"/> Grants received for enrollment purposes - granting organization name(s) and amount(s) |
| <input type="checkbox"/> Federal Employment Identification Number | |
| <input type="checkbox"/> State Tax ID | |



4 Steps to Becoming a Certified Enrollment Entity

2. REVIEW OF CEE APPLICATION BY COVERED CALIFORNIA

- Once submitted, applications default to “Pending” status
 - Triggers application review process
- Application is reviewed for completeness and program eligibility
- Organization receives notification by email or phone regarding missing application information needed for approval (if applicable)
- Review process takes 5 - 7 business days



4 Steps to Becoming a Certified Enrollment Entity

3. RECEIVE APPROVAL OF SUBMITTED CEE APPLICATION

- Will receive notification by email regarding status of application approval
- Will receive notification by email and directions for next steps to follow to complete the required Certified Enrollment Entity Management Training



4 Steps to Becoming a Certified Enrollment Entity

4. MEET CERTIFIED ENROLLMENT ENTITY TRAINING REQUIREMENTS

- Receive email from Learning Management System (LMS) with login and password
- Individual(s) designated as Financial and Primary Contact(s) must complete CEE Management Training
- Webinar is approximately 2.5 hours and must be completed within 90 days
- Concurrent with the CEE Management Training, CEE should begin developing a roster of active Certified Enrollment Counselors



CEE Training Objectives

CEE Training will cover

- Covered California Overview
- In-Person Assistance Program Overview
- Certified Enrollment Entities Roles and Responsibilities
- Certified Enrollment Counselor Recruitment, Role, Services, and Support
- Compensation
- Expectations for Monitoring, Reporting and Quality Assurance
- Collateral Materials Management
- Certified Enrollment Entity Agreement

Identifying Certified Enrollment Counselors and Becoming a Certified Enrollment Counselor





Identifying Certified Enrollment Counselors

CERTIFIED ENROLLMENT COUNSELOR (CEC)

- An individual certified by Covered California to provide face-to-face, one-on-one consumer assistance

IDENTIFYING CECs

- Individuals who:
 - Must Attend a 3-Day Training to Become Certified
 - Will Provide Consumer Assistance

CEE HAS A RESPONSIBILITY TO:

- Recruit individuals who are seeking to affiliate, or select internal staff to become CECs
- Provide guidance to individuals to become CECs throughout the certification process
- Follow Covered California guidelines pertaining to the fingerprint and criminal records check



4 Steps to Becoming a Certified Enrollment Counselor

1. AFFILIATE WITH A CERTIFIED ENROLLMENT ENTITY

- CEE provides individuals with a Certified Enrollment Counselor (CEC) Application and Agreement
- Individual completes and returns the one-page CEC Application and the signed Agreement to the CEE
- CEE reviews information and completes CEC section of the application online and uploads signed Agreement
 - CEE has the ability to add additional counselors in IPAS at anytime.



4 Steps to Becoming a Certified Enrollment Counselor

2. COMPLETE FINGERPRINTING-BASED CRIMINAL BACKGROUND CHECK

- Download and complete Criminal Record Disclosure form at:
<http://www.healthexchange.ca.gov/Documents/CECdisclosure.pdf>
- Mail Completed Criminal Record Disclosure form to:

Covered California

PO Box 1199

Sacramento, CA 95814

- **NOTE:** Any communication in connection with the Criminal Disclosure Form is between the individual applicant and Covered California. The CEE will **not** be involved in the collection or review of the content of this document.



4 Steps to Becoming a Certified Enrollment Counselor

2. COMPLETE FINGERPRINTING-BASED CRIMINAL BACKGROUND CHECK

- Receive request for Live Scan Service and list of approved fingerprinting locations from CEE or download:
- Request for Live Scan Service at:
<http://www.healthexchange.ca.gov/Pages/EnrollmentAssistanceProgram/LiveScanService.aspx>
- Fingerprinting service locations at:
http://www.capitalivescan.com/covered_ca_home.html



4 Steps to Becoming a Certified Enrollment Counselor

2. COMPLETE FINGERPRINTING-BASED CRIMINAL BACKGROUND CHECK (CONT.)

- Complete request for Live Scan Service Form and schedule appointment at chosen location
- Upon receipt of “clear” fingerprinting report from Covered California, CEC will proceed with the certification process
- Once approved for certification process, CEC receives email from Learning Management System (LMS) with login and password information for training
- Login to LMS to access schedule of Certified Enrollment Counselor training sessions and register for a session



4 Steps to Becoming a Certified Enrollment Counselor

3. COMPLETE CERTIFIED ENROLLMENT COUNSELOR TRAINING

- Attend a 3-Day Certified Enrollment Counselor Training
 - Must Attend ALL Three Consecutive Days
- Complete Covered California Certification Exam online
- Score 80% or better on the exam to become a Certified Enrollment Counselor
 - Get three tries to score 80% or better
- Receive email notification of successful exam completion
 - Including login information to create profile in CalHEERS (Covered California's Online System)



4 Steps to Becoming a Certified Enrollment Counselor

4. CREATE USER PROFILE IN CALHEERS

Login to CalHEERs to Create CEC Profile

- Additional information will be provided in upcoming weeks
- Begin Assisting Consumers!

Fingerprinting and Background Check Process for Individuals





Criminal Background Check and Fingerprinting

- The Certified Enrollment Entity is required to facilitate a fingerprint based **criminal background** check on all its affiliated personnel who plan to become Certified Enrollment Counselors, as CECs will have access to CalHEERS and confidential consumer information.
 - **Confidential consumer information** includes personal identifying information, personal health information, federal tax information, or any other information as required by federal law or guidance applicable to Covered California.
- Fingerprint based background check reports are received by Covered California.
- Covered California notifies CEE of affiliated personnel's clearance and eligibility for training.



Criminal Background Check and Fingerprinting

- An individual applying to become a Certified Enrollment Counselor must fill out a Criminal Disclosure Form
<http://www.healthexchange.ca.gov/CECdisclosure>
- This form is to be completed by the individual applying to become a Certified Enrollment Counselor and mailed directly to Covered California

Covered California

PO Box #1199

Sacramento, CA 95814

- Only the individual completing the Criminal Disclosure Form may **view or mail** the form. Certified Enrollment Entity personnel are **NOT** allowed to process, view, collect or mail this disclosure form for the individual



Completing the Criminal Background Check and Fingerprinting Process

- Upon approval of the CEE application, the CEE will notify their affiliated individuals who have completed their CEC agreement and Criminal Disclosure form that they are ready to get fingerprinted.
- CEE to provide individuals with Live Scan service website link.



Completing the Criminal Background Check and Fingerprinting Process

- Individuals must use Covered California approved service locations
- Fingerprint fee is paid for by Covered California
- Individual completes the request for the Live Scan Service Form and schedules appointment at chosen Covered California approved fingerprinting location



Completing the Criminal Background Check and Fingerprinting Process

- Upon receipt of “clear” fingerprinting report from Covered California, CEE and individual will receive an email and may proceed with the certification process
- Individual receives an email from Learning Management System (LMS) with login and password for training
- Individual logs in to LMS to access schedule for Certified Enrollment Counselor training sessions and registers for training

TIMELINE FOR FINGERPRINT PROCESS:

- The CEE and CEC, upon receipt of 'clear' fingerprint report, will receive notification from Covered California of the approval to proceed with the certification process
- Processing time will vary per individual

CEC Training





Enrollment Counselor Training Modules

➤ Introduction to the Affordable Care Act	Eligibility and Enrollment for Small Businesses
➤ Introduction to Covered California	➤ Covered California Plan Options
➤ Introduction to Health Insurance	➤ Enrollment Support for Individuals and Families
➤ Certified Enrollment Counselor Role	➤ Compliance Standards
➤ Eligibility for Individuals and Families	➤ Privacy and Security
	➤ Providing Consumer Assistance

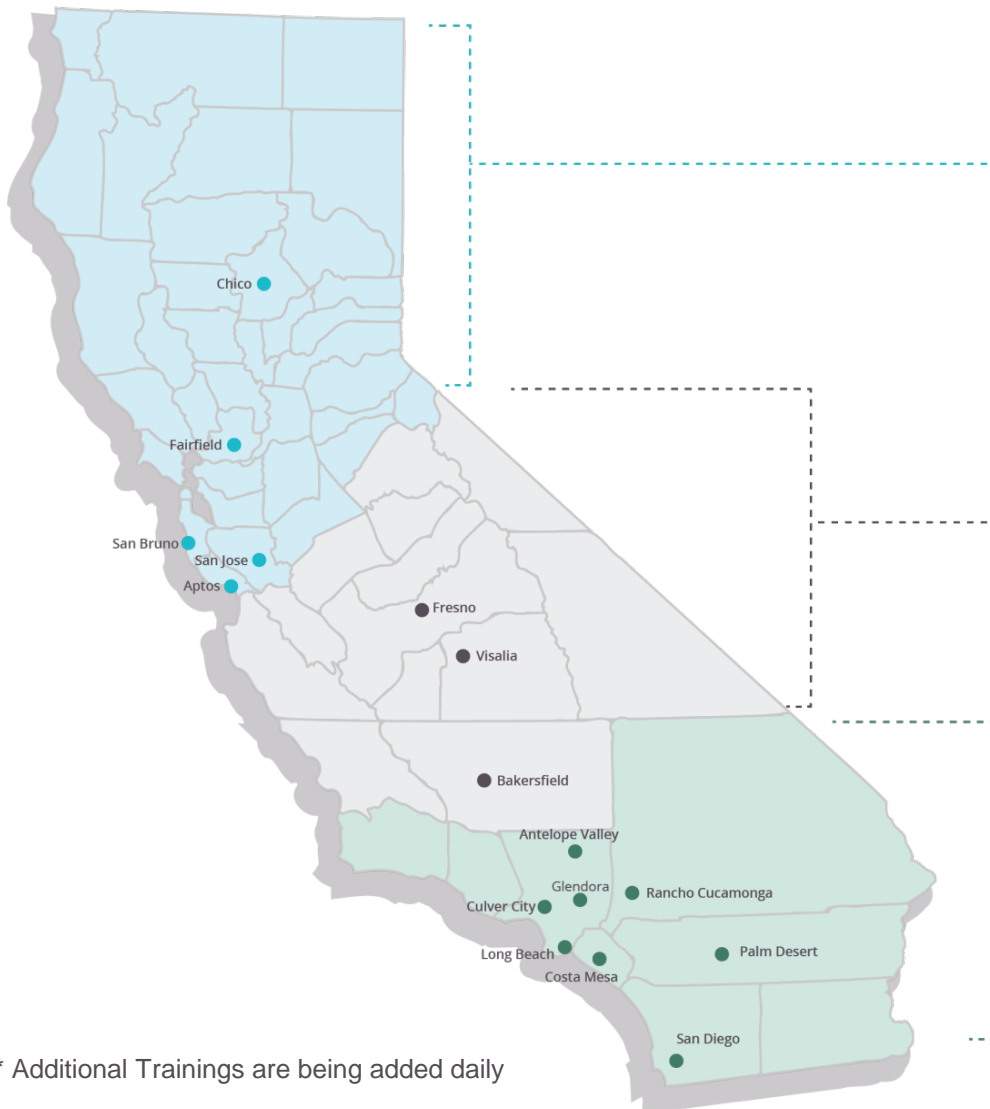
- For each course, participants will receive a comprehensive Participant Guide and the instructor's PowerPoint slides
- 3 days of training led by a Covered California trainer
- In order to achieve certification, attendees must achieve a score of 80%
- Must attend annual recertification.



To Sign up and Schedule Training

- Once approved for certification process, individual will receive email from Learning Management System (LMS) with login and password information for training
- Training will begin September 11, 2013 and will be offered weekly statewide
- Login to LMS to access schedule of Certified Enrollment Counselor Training sessions and register for a suitable session

Scheduled Trainings (to date)



Northern Region

City	Session Dates
Aptos	9/18 - 9/20 9/25 - 9/27
San Jose	9/17 - 9/19 9/24 - 9/26 10/1 - 10/3
Fairfield	9/30 - 10/2
Chico	9/30 - 10/2
San Bruno	9/16 - 9/18

Central Region

City	Session Dates
Fresno	9/23 - 9/25 9/30 - 10/2
Bakersfield	9/23 - 9/25 9/30 - 10/2
Visalia	9/30 - 10/2

Southern Region

City	Session Dates
Culver City	9/11 - 9/13 9/16 - 9/18 9/23 - 9/25 9/30 - 10/2
San Diego	9/11 - 9/13 9/16 - 9/18 9/23 - 9/25
Long Beach	9/16 - 9/18 9/30 - 10/2
Rancho Cucamonga	9/18 - 9/20 9/23 - 9/25 9/30 - 10/2
Glendora	9/18 - 9/20 9/25 - 9/28
Antelope Valley	10/3 - 10/5
Palm Desert	9/23 - 9/25

* Additional Trainings are being added daily



To Sign up and Schedule Training

Dates	Region	County	City
9/11/13 - 9/13/13; Wed-Fri	Southern	Los Angeles	Culver City
9/11/13 - 9/13/13; Wed-Fri	Southern	San Diego	San Diego
9/16/13 - 9/18/13, Mon-Wed	Southern	Los Angeles	Culver City
9/16/13 - 9/18/13, Mon-Wed	Southern	Los Angeles	Long Beach
9/16/13 - 9/18/13, Mon-Wed	Southern	San Diego	San Diego
9/16/13 - 9/18/13, Mon-Wed	Northern	San Mateo	San Bruno
9/17/13 - 9/19/13; Tues-Thurs	Northern	Santa Clara	San Jose
9/18/13 - 9/20/13; Wed-Fri	Southern	San Bernardino	Rancho Cucamonga
9/18/13 - 9/20/13; Wed-Fri	Southern	Los Angeles	Glendora
9/18/13 - 9/20/13; Wed-Fri	Southern	Orange	Costa Mesa
9/18/13 - 9/20/13; Wed-Fri	Northern	Santa Cruz	Aptos
9/23/13 - 9/25/13; Mon-Wed	Southern	San Bernardino	Rancho Cucamonga
9/23/13 - 9/25/13; Mon-Wed	Southern	Riverside	Pam Desert
9/23/13 - 9/25/13; Mon-Wed	Southern	Los Angeles	Culver City
9/23/13 - 9/25/13; Mon-Wed	Southern	San Diego	San Diego
9/23/13 - 9/25/13; Mon-Wed	Central	Fresno	Fresno
9/23/13 - 9/25/13; Mon-Wed	Central	Kern	Bakersfield
9/24/13 - 9/26/13; Tues-Thurs	Northern	Santa Clara	San Jose
9/25/13 - 9/27/13; Wed-Fri	Southern	Los Angeles	Glendora
9/25/13 - 9/27/13; Wed-Fri	Southern	Orange	Costa Mesa
9/25/13 - 9/27/13; Wed-Fri	Northern	Santa Cruz	Aptos
9/30/13 - 10/2/13; Mon-Wed	Southern	San Bernardino	Rancho Cucamonga
9/30/13 - 10/2/13; Mon-Wed	Southern	Los Angeles	Culver City
9/30/13 - 10/2/13; Mon-Wed	Southern	Los Angeles	Long Beach
9/30/13 - 10/2/13; Mon-Wed	Northern	Butte	Chico
9/30/13 - 10/2/13; Mon-Wed	Northern	Solano	Fairfield
9/30/13 - 10/2/13; Mon-Wed	Central	Tulare	Visalia
9/30/13 - 10/2/13; Mon-Wed	Central	Fresno	Fresno
9/30/13 - 10/2/13; Mon-Wed	Central	Kern	Bakersfield
10/1/13 - 10/3/13; Tues-Thurs	Northern	Santa Clara	San Jose
10/3/13 - 10/5/13; Thurs-Sat	Southern	Los Angeles	Antelope Valley



For More Information

- To complete the CEE Application, go to:
<http://www.healthexchange.ca.gov/Pages/EnrollmentAssistanceProgram.aspx>
- Learn more about the program by reviewing the 101 presentation at:
<http://www.coveredca.com/news/press-releases/101-archive.html>



For More Information

- For questions or assistance, please call the Covered California Enrollment Assistance Help Desk
1-888-402-0737
Monday – Friday, 8:00 AM to 5:00 PM
- Email support is available at:
assisterinfo@ccgrantsandassisters.org
- **Enrollment Assistance Specialists are available in your area to provide support**

Questions & Answers

